RESULTS

Atlas Van Lines
20th Annual Survey
of Corporate Moving Practices

Atlas Van Lines
World-Class Moving.®

According to the 20th Annual Survey. . .

This Survey of Corporate Moving Practices, conducted by Atlas Van Lines, celebrates the 20th Anniversary of the first Survey presented in 1968. The annual Survey has come to be eagerly awaited and referred to by major segments of the relocation industry in particular, and by the transportation industry in general.

The 20th Survey once again focused on three areas: Part One — Individual and Corporate Profile; Part Two — Corporate Moving Policies; and Part Three — Transportation and the Regulatory Environment.

This year's relocation executives who responded to the Survey represented major United States corporations from five broad segments of the national economy. In addition to the Fortune 1,000 industrial companies, the 66 questions were also sent to 4,200 of the largest companies (based on sales) in retailing, insurance, banking, and transportation.

Most of the companies had 1986 sales of more than $100 million (81 percent), with the biggest percentage employing 100-1000 salaried people (31 percent).

Unlike the 1986 Survey, which indicated that 16 percent of the companies had traffic or transportation departments administering their corporate moving policies, this year's analysis revealed that more than half of the companies (52 percent) handled their own corporate relocations in the personnel or human resources area.

Although the percentage was smaller this year, most of the respondents were again in the manager category (32 percent). The majority of those people (51 percent) have been involved with employee relocations for 2-10 years; about the same number as last year (53 percent).

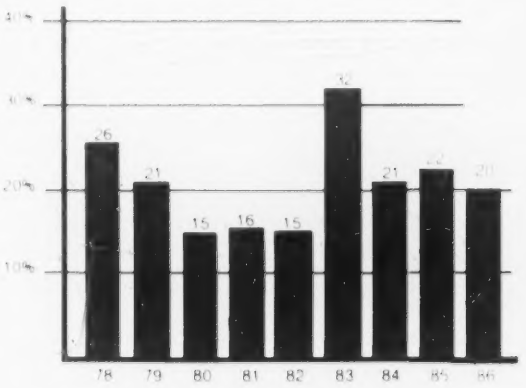
A high percentage this year was male (60 percent), but that's lower than both last year (62 percent) and the year before that (73 percent). Most of the companies arranged fewer than ten relocations in 1986 — for interstate moves, the figure was 31 percent (versus 36 percent last year); for intrastate, the figure was 50 percent (versus 58 percent).

As in 1986, most of the companies (79 percent) handled their relocations from a centralized transportation department, not from regional offices. In the companies without a centralized department, less than half (38 percent) make the carrier selection without consulting the employee. Only one in five of those non-centralized companies (18 percent) allows the employee alone to make the selection, although twice that percentage work with the relocating employee to make the choice. The use of a relocation firm is becoming more common, but the figure is still low (8 percent versus 6 percent last year).

Most of the companies in this year's Survey were about equally divided in terms of geographic reach: they were national (29 percent this year versus 30 percent in 1986), regional (33 percent versus 37 percent), and international (38 percent versus 34 percent). Whatever the geographical scope, once again the majority were multidivisional (62 percent) and publicly owned (67 percent).

Projected changes in the number of employees the companies anticipate moving during 1987 echo last year's figures — 20 percent of the companies expect to increase the number of employees they would move this year versus last year. That degree of expected increase is in line with the average of the last seven years (21 percent), although the unusually optimistic figure of three years ago (32 percent in the 1984 Survey) remains well above that average.

Percentage of companies anticipating moving more employees during 1987 then were moved in 1986.



Just as last year, the averge relocating salaried employee can reasonably expect to be moved less frequently than every five years (68 percent of the responses indicated that), with the next most likely category every third year (17 percent versus 11 percent).

And for 94 percent of the companies (93 percent in 1986), those relocating employees represent less than 11 percent of the salaried work force. Women are still less likely to be transferred — in 1986, 24 percent of the companies had no female relocations (versus 25 percent the prior year). And less than 5 percent of the transferred employees of an additional 53 percent of the companies were women.

All of those figures are in the context of this 1986 — versus — 1985 comparison: 38 percent of the respondents indicated they had more transfers in 1986; 22 percent had fewer, and 40 percent had about the same number. That first figure — 38 percent — is up from last year's 36 percent.

In 1986, 73 percent of the most frequently transferred salaried employees are 31-40 years old. Further, most transferred employees are salespeople (41 percent) followed by plant and facility managers (17 percent).

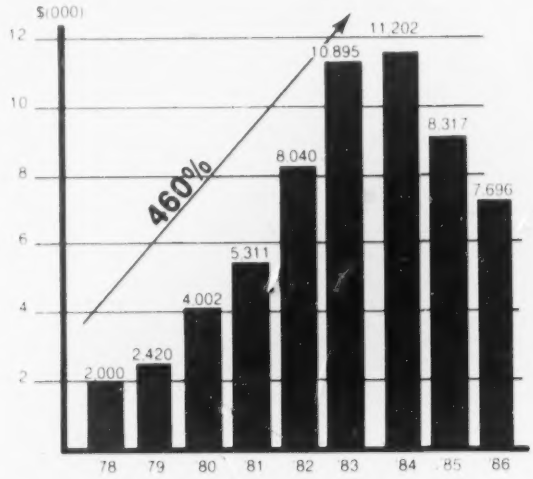
Once again, the most frequently relocated employee earns $31,000-$40,000 (40 percent versus 42 percent); 16 percent are between $26,000 and $30,000 (versus 19 percent), with 36 percent in the $40,000-plus range (versus 25 percent last year).

Reflecting a steady but pronounced economic rebound, 35 percent of the companies indicated that economic conditions had an external impact on the changing numbers of employee transfers. Looking back, especially to a time when the economy was much less healthy, the figure was 95 percent in 1981. It fell to 78 percent in 1982. Last year's figure was — 31 percent. The correlation between a strong national economy and increased, future corporate relocations seems clear.

Also continuing to positively affect the activity of moving the household goods of transferred employees were internal company conditions — factors like promotions (35 percent of the companies cited that factor), corporate reorganization (29 percent), expansion into new territories (28 percent), and activity involving acquisitions and mergers (16 percent).

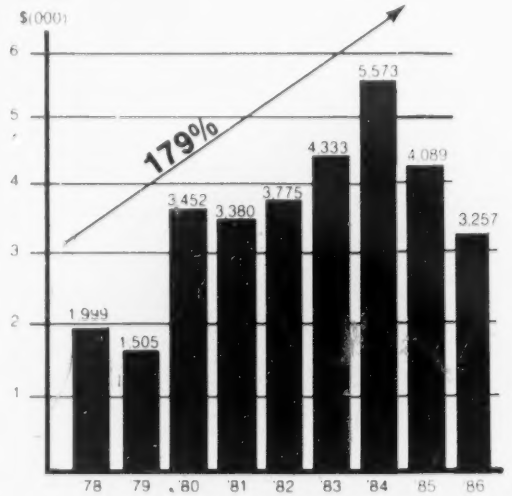
Dramatically, for the second time since 1978, costs for domestic moves actually fell. The average for moving "extras" — relocations services, hotel accommodations, family transportation, meals, house-hunting trips, and so on — was $7,696. That's a 7 percent drop from 1986 ($8,317) and the second decline after seven consecutive increases that measured 460 percent above the 1978 figure of $2,000. The $7,696 figure is a 31 percent drop from $11,202 of 1985.

Cost for moving "extras."



The average, direct van line packing and transportation services cost also fell again — it was $3,257, down 20 percent from last year's $4,089. Although the change in this category from 1978 to 1984 (179 percent) was less steep and consistent than the "extras" figure, this year's drop is also significant.

Average cost of direct van line packing and transportation services.



Clearly, in 1986, it was less costly to purchase relocations services, whether it be moving "extras" or

direct services. Although the reduced dollar amounts are surprising at a first reading, they are not at all unexpected in the context of the deep discounting that gathered so such steam in 1985.

Trends still echo an increasing concern for the transferee's future needs in his new location and for the needs of his family. Just as last year's results showed, full reimbursement of moving expenses is provided by 82 percent of the responding companies, and 58 percent allow more than one expense-paid house-hunting trip.

At the same time, 89 percent (versus 82 percent) of the companies allowed three or more days for each trip. Spouses continue to be paid to go along — 95 percent of the companies cover at least one trip.

And an employee's relocation continues to be affected by the employment status of that employee's spouse — the relocation is "almost always or frequently" affected 22 percent of the time. Similarly, when the spouse is employed full-time with another company, in nearly half of the cases, that situation increased the relocation complications of the transferee's company.

Companies surveyed are inclined to purchase the residence of a relocating employee if a buyer can't be found within a reasonable time. Perhaps because the cost of financing has become much more reasonable; 42 percent of the companies, in 1986, would actually purchase the former residence (versus 46 percent in 1985).

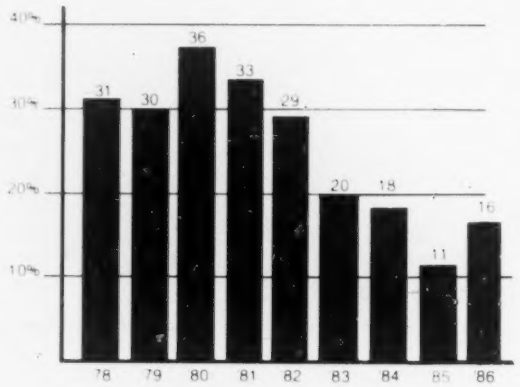
The most common method of calculating the purchase price is to pay the average of several appraisals (80 percent of the responding companies versus 70 percent). Making an arrangement with a national realtor, at least last year, was not very common (7 percent of the companies did that).

Other significant benefits are also increasingly being offered to relocating employees — benefits like paying a lease-termination penalty (22 percent of the responding companies), paying all of the fees connected with the purchase or sale of a residence (31 percent), assisting with a mortgage or swing loan (44 percent), offering a mortgage-interest differential (36 percent), and paying a cash bonus (52 percent).

In 1985, at least one employee at 71 percent of the companies declined the opportunity to relocate — the figure last year was higher yet: 89 percent. That figure has remained fairly steady during the last decade, but those employees who refused a transfer represent between 5-7 percent of their companies' work force in the vast majority of cases (83 percent of the companies).

Since 1980, fewer employees are turning down a relocation. That year, 36 percent of the reporting companies indicated that refusals to relocate increased from the previous year. In 1981, the figure fell to 33 percent; in 1982, 29 percent; in 1983, 20 percent; in 1984, 18 percent. The 1985 figure fell further, to 11 percent. Last year, it increased — to 16 percent. However, it should be noted that 100 percent of the respondents pointed out that declining the opportunity to relocate hindered an employee's career.

Percentage increases of refusals to relocate versus the previous year.



The reasons for declining a move are these: the lack of a desire to move (31 percent of the reporting companies indicated that reason), family ties (30 percent), cost of living in the new location (33 percent), spouse's employment (31 percent), and concerns about housing and mortgage financing (23 percent).

Deregulation — or "reregulation," as it's sometimes called — was ushered in with the passage of the Household Goods Transportation Act of 1980. And since that time, two ways of doing business continue to be selected as the most beneficial by-products of deregulatory legislation — volume discounts (45 percent of the companies) and contracts (18 percent).

This year's Survey indicated that 70 percent of the companies had contractual agreements with more than one carrier, the same percentage as the year before. That situation reflects, in part, the continuing

strong market position of the corporate buyer (the shipper) versus the seller (the carrier). All companies (100 percent) rated their contract carriage arrangements as "excellent or good."

The main guideline to evaluate a carrier was once again dependable and flexible service. Price was the second most important evaluation guideline. That service/price trade-off reflects the ongoing tug of war between what the carrier wants to stress — service — and what the shipper often turns to — price. Employee feedback and claims were of third and fourth importance.

Service was also once again the primary factor companies used to select a carrier. Price was second, followed about equally by claims and reputation.

For the third year, there were Survey questions about insurance coverage of transported goods. Over half of the companies use full replacement value protection, an increase from last year's 50 percent. Up from 24 percent was the figure for transporting at a released rate of 60¢ per pound, per article (26 percent). The remainder of the companies (19 percent) use declared value protection, which is based on depreciation.

Repeating a recently introduced question, the Survey measured the effects of deregulation on the airline, general commodity trucking, household goods moving, communications, and finance industries. In general, deregulation has continued to benefit users, but the positive effects for providers fell off markedly.

Other important Survey findings include the following:

1. The emphasis was on the side of transferees (60 percent), that received more benefits over new hires.
2. It was determined that less than 8 percent of a company's transferred employees leave after being transferred.
3. The summer months of June through September continue to be the busiest period (61 percent of the companies), with April and May the second busiest (20 percent).
4. Another new question asked if companies would consider "one-stop shopping" as a means of securing all of the needed relocation services — real estate services, transportation services, counseling services, and so on. The answer was a definite "no" in 1985 with 74 percent of the respondents not interested in obtaining those services through a single source. But this year, 56 percent said "yes".
5. Up from 34 percent last year, 42 percent of the companies use a relocation service — and companies with less than ten yearly interstate moves were the most frequent users of such a service.
6. Based upon a weighted average, moving "extras" were $7,696 — for regional companies, the figure was $4,477; national, $10,905; international, $8,061.
   Based upon a weighted average, direct van line costs were $3,257 — for regional companies, the figure was $2,450; national, $3,803; international, $3,554.
8. The ages of transferees revealed that 96 percent were between 25 and 45 years of age.

The 20th Survey is available at no charge from Atlas' Public Information Department. Findings from this year's questionnaire will help the major household goods carriers more efficiently meet their corporate customers' increasingly complex needs. As a direct result, both shippers and carriers benefit, and the moving industry in general is also a major beneficiary.

ATLAS VAN LINES, INC.

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NOTE: For the following questions--8, 21-24, 26, 30, 41, 48, 60-61--percentage totals exceed 100 because the Survey asked for more than one response to each question. Also, because percentages have been rounded up, some totals in the other questions may not exactly equal 100.

PART ONE -- Individual and Corporate Profile

1. Which one of the following categories best represents the focus of your department?

   (a) Personnel/Human Resources 52%
   (b) Traffic/Transportation 8%
   (c) Administration 10%
   (d) Purchasing 2%
   (e) Industrial Relations 1%
   (f) Special Services 1%
   (g) Real Estate 2%
   (h) Finance 2%
   (i) Personnel/Compensation and Benefits 6%
   (j) Law 0%
   (k) Marketing 1%
   (l) Other 5%

2. Which one of the following categories best describes your position within the company?

   (a) President 6%
   (b) Vice-President 17%
   (c) Assistant Vice-President 3%
   (d) Manager 32%
   (e) Director 16%
   (f) Owner 0%
   (g) Major Stockholder 0%
   (h) Other 26%

3. How long have you been involved with employee relocation?

   (a) Less than 2 years 20%
   (b) 2-5 years 29%
   (c) 6-10 years 22%
   (d) 11-15 years 13%
   (e) 16-20 years 7%
   (f) More than 20 years 8%

4. Are you . . .

   (a) Male? 60%
   (b) Female? 40%

5. Approximately how many interstate employee relocations was your department responsible for in 1986?

   (a) 0-9 31%
   (b) 10-19 12%
   (c) 20-49 17%
   (d) 50-99 12%
   (e) 100-199 13%
   (f) 200-299 6%
   (g) More than 300 10%

6. Approximately how many intrastate employee relocations was your department responsible for in 1986?

(a) 0-9 50%
(b) 10-19 16%
(c) 20-49 19%
(d) 50-99 6%
(e) 100-199 5%
(f) 200-299 3%
(g) More than 300 1%

7. Does your company have a centralized transportation department--that is, from the main corporate office versus regionally?

(a) Yes 79%
(b) No 21%

8. If you answered "Yes" to question 7, does your company's centralized transportation department (circle appropriate response to each question) . . .

(a) Yes Control air carrier selection? 29%
(b) Yes Control freight carrier selection? 14%
(c) Yes Control household goods carrier selection? 9%
(d) Yes Handle office relocations? 25%
(e) Yes Recommend site and space selection for office relocations? 42%
(f) Yes Handle air travel via commercial airline? 37%
(g) Yes Handle air travel via corporate aircraft? 44%
(h) Yes Handle ground transportation via corporate vehicles? 33%

9. If you answered "No" to question 7, who selects the carrier that is responsible for your employee's move?

(a) The company 38%
(b) The employee 18%
(c) The company and the employee in combination 35%
(d) A relocation firm 8%
(e) Other 3%

10. Which one of the following classifications most accurately describes your company?

(a) Manufacturing 29%
(b) Service (includes government, education, health care, etc.) 37%
(c) Financial 33%

11. Is your company . . .

(a) Multidivisional? 62%
(b) Centralized? 38%

12. Is your company . . .

(a) Regional? 33%
(b) National? 29%
(c) International? 38%

13. Is your company . . .

(a) Publicly owned? 67%
(b) Privately owned? 33%

14. Your company's approximate annual sales for 1986 were . . .

(a) Less than $10 million 7%
(b) $10-$49 million 3%
(c) $50-$99 million 9%
(d) $100-$499 million 24%
(e) More than $500 million 57%

15. How many salaried (that is, non-hourly) people are employed by your company?

(a) Less than 100 8%
(b) 100-499 18%
(c) 500-999 13%
(d) 1,000-1,999 11%
(e) 2,000-2,999 14%
(f) 3,000-5,000 13%
(g) More than 5,000 25%

16. What percentage of those salaried employees did your company move or relocate during 1986?

(a) Less than 5% 74%
(b) 5%-10% 20%
(c) 11%-15% 3%
(d) 16%-20% 1%
(e) More than 20% 2%

17. Which one of the following categories most accurately describes the frequency with which an average salaried employee of your company can reasonably expect to be moved?

(a) Every year or more often 1%
(b) Every second year 3%
(c) Every third year 17%
(d) Every fourth year 7%
(e) Every fifth year 4%
(f) Less frequently than once every five years 67%

18. In 1986, how many of your transferred employees were women?

(a) None 24%
(b) Less than 5% 53%
(c) 5%-10% 10%
(d) More than 10% 14%

19. Do you anticipate that the number of employees your company will move during 1987 will . . .

(a) Increase from the number moved in 1986? 20%
(b) Decrease? 20%
(c) Remain about the same? 60%

20. Comparing the number of employee transfers in 1986 with 1985, the 1986 number . . .

(a) Increased greatly versus 1984 13%
(b) Increased moderately versus 1984 25%
(c) Decreased greatly versus 1984 9%
(d) Decreased moderately versus 1984 13%
(e) Remained about the same 40%

21. If the number of employee transfers changed from 1985 to 1986, what external conditions had the most significant impact on that number? Check each applicable response.

(a) Economic conditions 35%
(b) Energy 3%
(c) Political conditions 2%
(d) Growth of industry 27%
(e) Lack of qualified people locally 16%
(f) Other 20%

22. What internal company conditions affected the change in the number of employee transfers? Check each applicable response.

(a) Increased production 12%
(b) Decreased production 5%
(c) Expansion of facility 22%
(d) Closing of facility 22%
(e) Expansion into new territories 28%
(f) Budget constraints 18%
(g) Acquisitions/mergers 16%
(h) Corporate reorganization 29%
(i) Promotions/resignations 35%
(j) Other 5%

PART TWO--Corporate Moving Policies

23. How has your corporate moving policy changed during the last two years? Check each applicable response.

(a) Increased housing assistance with housing problems 30%
(b) Improved insurance programs 22%
(c) Exceptions to the policy are made if individual circumstances so warrant 14%
(d) Expanded benefits other than housing assistance 8%
(e) Has not changed 7%
(f) Decreased benefits 58%

24. How is information about your company's employee transfer policy made known to your employees?

(a) Employee is provided a detailed handbook or brochure describing all procedures and conditions 20%
(b) Employee is provided printed material describing company policies, and this information is also explained by authorized personnel within the company 67%
(c) Pre-move counseling is provided within the company 15%
(d) There is no set policy--each case is handled individually and explained on a one-to-one basis 16%
(e) Professional counseling is provided by a relocation firm 5%

25. How does your company handle moving expense reimbursement?

(a) Full reimbursement of moving expenses 82%
(b) Partial reimbursement based on salary, position, tenure, etc. 16%
(c) No reimbursement of moving expenses 2%

26. Besides the packing and transportation of household goods, does your company allow the relocating employee (circle appropriate response to each question) . . .

(a) Yes To move an automobile at company expense? 22%
(b) Yes To move a second automobile at company expense? 41%
(c) Yes To move a boat at company expense? 69%
(d) Yes To have belongings picked up from a secondary residence (summer home, relative's home, etc.)? 60%
(e) Yes To hire temporary maid service at either the old or the new residence? 92%
(f) Yes To move unlimited weight? 33%
(g) Yes Permanent storage of some possessions? 85%
(h) Yes To move collections of highly valuable objects like statuary, paintings, and antiques? 37%
(i) Yes To move pets? 57%
(j) Yes To move recreation and lawn equipment? 18%

27. How many expense-paid trips does your company allow an employee in order to find housing in the new location?

(a) None 0%
(b) One 42%
(c) Two 52%
(d) Three 2%
(e) More than three 4%

28. What is the average number of days allowed for a house-hunting trip?

(a) 1-2 11%
(b) 3-4 40%
(c) 5-6 27%
(d) More than 6 22%

29. How many expense-paid, house-hunting trips does your company allow the spouse to accompany your employee?

(a) None 5%
(b) One 41%
(c) Two 41%
(d) Three 9%
(e) More than three 4%

30. With regard to buying or selling an employee's home, does your company or its authorized representative (circle appropriate response to each question) . . .

(a) Yes Pay none of the selling costs? 74%
(b) Yes Pay only the real estate commission? 74%
(c) Yes Pay all of the fees connected with the purchase or sale of the house (lawyer, title, land surveys, etc.)? 31%
(d) Yes Guarantee a sale price for the employee's former residence? 54%
(e) Yes Actually purchase the employee's former residence? 42%
(f) Yes Pay a lease-termination penalty? 22%
(g) Yes Assist in the sale of a vacation home? 90%
(h) Yes Offer no assistance in the new location? 73%
(i) Yes Assist with the arrangement of a mortgage or swing loan? 44%
(j) Yes Pay a cash bonus? 52%
(k) Yes Offer a mortgage-interest differential? 36%
(l) Yes Offer a cost-of-living differential? 73%

31. If your company will buy an employee's former residence--if no other buyer can be found within a reasonable time--how do you determine the sale price?

(a) Pay the employee's asking price 0%
(b) Pay the employee the appraised value 10%
(c) Negotiate with the employee 3%
(d) Pay the average of several appraisals 80%
(e) Arrange with a national realtor to act on behalf of the company and the employee 7%

32. Does your company's moving policy allow more benefits for new hires or for transferees?

(a) New hires 5%
(b) Transferees 60%
(c) No difference 35%

33. During 1986, what was the average cost per domestic move to your company for such "moving extras" as relocation firms; motel accommodations; family transportation; meals; maid service; pre-move, house-hunting trips; appliance servicing; and similar items? Exclude any salary increases, the cost of van line services, housing compensation, and financial assistance to employees disposing of former residences.

$ 7,696

34. During 1986, what was the average cost per domestic move to your company for direct van line packing and transportation services? Exclude "moving extras" as described in question 33.

$ 3,257

35. Moving costs--"extras" and direct van line packing and transportation services--are what percentage of your company's total cost of relocating an employee?

(a) Less than 10% 15%
(b) 11%-20% 17%
(c) 21%-30% 14%
(d) 31%-40% 10%
(e) 41%-50% 9%
(f) More than 50% 36%

36. Has that percentage increased or decreased during the past five years?

(a) Increased 38%
(b) Decreased 7%
(c) Stayed about the same 55%

37. If your company arranges for the movement of household goods in connection with employee relocations, does it transport the goods . . .

(a) At a released rate of 60¢ per pound, per article? 26%
(b) With declared value protection (depreciation value)? 19%
(c) With full replacement value protection? 55%

38. If your company ships at a released rate (60¢ per pound, per article), is your company . . .

(a) Self-insured at full replacement cost? 51%
(b) Self-insured at a declared value protection? 12%
(c) Instructing the carrier to settle as fully insured and charging the difference to your insurer? 22%
(d) Instructing the carrier to settle at a released rate and having the relocating employee submit a second claim to your insurer for the difference? 16%

39. If your company uses the declared value protection, what do you feel is the appropriate dollar-per-pound valuation?

(a) Less than $3.00 36%
(b) $3.00-$3.99 39%
(c) $4.00-$4.99 16%
(d) $5.00-$5.99 2%
(e) More than $6.00 7%

40. If your company does not currently arrange for full replacement value protection, are you planning to make that change?

Due to a statistically insignificant response, question 40 is rendered statistically invalid.

41. If your company uses replacement value protection (circle appropriate response to each question) . . .

Due to a statistically insignificant response, question 41 is rendered statistically invalid.

42. How frequently is an employee's relocation affected by the employment status of that employee's spouse?

(a) Almost always 1%
(b) Frequently 21%
(c) Seldom 62%
(d) Never 16%

43. If a relocating employee's spouse is employed full-time with another company, does that situation . . .

(a) Increase your company's relocation complications? 41%
(b) Decrease the complications? 1%
(c) Cause the complications to remain about the same? 59%

44. How does your company assist, if at all, an employee's spouse in finding employment in the new location?

(a) No assistance 85%
(b) Pay job-finder's fee 2%
(c) Find employment within the company 5%
(d) Find employment outside the company 8%
(e) Pay spouse's full or partial salary until hired 1%

45. Did at least one of your employees decline the opportunity to relocate during 1986?

(a) Yes 89%
(b) No 11%

46. If you answered "Yes" to question 45, how many employees--as a percentage of your company's work force--who were offered transfers declined the opportunity to relocate during 1986?

(a) Less than 4% 7%
(b) 5%-7% 83%
(c) 8%-10% 8%
(d) More than 10% 1%

47. If you answered "Yes" to question 45, did the number of employees declining relocation during 1986 . . .

(a) Increase from the 1985 level? 16%
(b) Decrease? 8%
(c) Remain about the same? 76%

48. What reasons did employees give for declining relocation?

(a) Cost of living in the new location 33%
(b) Family ties 30%
(c) Housing/mortgage concerns 23%
(d) Spouse's employment 31%
(e) No desire to move 31%
(f) Climate 3%
(g) Other 3%

49. Does declining the opportunity to relocate usually hinder an employee's career?

(a) Yes 100%
(b) No 0%

50. What percentage of your company's transferred employees leave after being transferred?

(a) Less than 5% 92%
(b) 6%-10% 5%
(c) 11%-25% 3%
(d) 26%-50% 0%
(e) More than 50% 0%

51. During which one of the following periods of the year did your company make most of its moves?

(a) January-March 10%
(b) April-May 20%
(c) June-September 61%
(d) October-December 10%

52. What is the average age of your company's most frequently transferred salaried employees?

(a) Less than 25 years 2%
(b) 25-30 years 12%
(c) 31-35 years 38%
(d) 36-40 years 35%
(e) 41-45 years 11%
(f) More than 45 years 2%

53. Which one of the following categories of your company's work force is most likely to experience the greatest number of relocations?

(a) Sales 41%
(b) Plant/facility management 17%
(c) Engineering 10%
(d) Data processing 1%
(e) Administration 16%
(f) Research and development 1%
(g) Finance 6%
(h) Marketing 8%

54. Does your company have contractual agreements for the transportation of . . .

(a) Products? 13%
(b) Displays and exhibits? 10%
(c) Employee relocations? 59%

55. What is the salary range of your company's most frequently transferred salaried employees?

(a) Less than $15,000 0%
(b) $15,000-$20,000 1%
(c) $21,000-$25,000 7%
(d) $26,000-$30,000 16%
(e) $31,000-$40,000 40%
(f) More than $40,000 36%

PART THREE -- Transportation and the Regulatory Environment

56. Since the passage of the Household Goods Transportation Act of 1980, which one of the following programs or services has been the most beneficial to your company?

(a) Guaranteed price 13%
(b) Replacement value protection 13%
(c) Volume discounts 45%
(d) Contracts 18%
(e) Guaranteed pickup and delivery 12%

57. With how many carriers does your company have contractual agreements for the transportation of household goods . . .

(a) One carrier? 30%
(b) Two carriers? 17%
(c) Three carriers? 24%
(d) Four or more carriers? 29%

58. If your company entered into a contract carriage agreement during 1986, what was the primary reason?

(a) Cost 44%
(b) Service 41%
(c) Reliability 15%

59. In terms of evaluation, what has been your company's experience with such contract carriage arrangements?

(a) Excellent 36%
(b) Good 64%
(c) Fair 0%
(d) Poor 0%

60. Does your company use the services of a relocation service or a brokerage firm? Check each applicable response.

(a) Relocation service 42%
(b) Brokerage firm 3%
(c) Relocation and brokerage services not used 36%

61. If you used a relocation service or a brokerage firm in 1986, which services did it provide? Check each applicable response.

(a) Counseling about the planning and details of moving 17%
(b) Counseling about company policy 11%
(c) Real estate sale and purchase 39%
(d) Orientation tours in the new location 9%
(e) Arrangement of family's transportation and accommodations 3%
(f) Contact of household moving company 7%
(g) Audit and/or payment of invoice 5%
(h) Monitoring of shipment 7%
(i) Assistance with employee claims preparation and submission 5%
(j) Supplementary services (appliances, cleaning, etc.) 1%

62. Would your company consider "one-stop shopping" as a means of securing all of the needed relocation services? That is, would you obtain — through a single source — real estate services, transportation services, counseling services, and so on?

(a) Yes 56%
(b) No 44%

63. Rank the following guidelines in terms of carrier evaluation ("1" = the most important).

(a) 1 Service (dependability, flexibility)
(b) 3 Employee feedback
(c) 4 Claims
(d) 2 Price

64. From your relocating employees' perspective, rank the following parts or aspects of a move in terms of importance ("1" = the most important).

(a) 1 Salesperson/Origin Agent
(b) 2 Packer
(c) 3 Driver
(d) 4 Destination Agent
(e) 5 Claim processing in the event of loss or damage.

65. Rank the following guidelines in terms of carrier selection ("1" = the most important).

(a) 1 Service (past performance of carrier agent)
(b) 2 Price
(c) 3 Claims
(d) 4 Reputation

66. Based on your experience, how would you classify the effects of deregulation (or "reregulation," as some observers describe it) on the following industries, in terms of user and provider. Check one response for user effects and one response for provider effects for each industry.

(a) Airline industry

(1) Better for all users 29%
(2) Better for some users 52%
(3) Worse for all users 12%
(4) Worse for some users 7%
(5) Better for all providers 8%
(6) Better for some providers 52%
(7) Worse for all providers 13%
(8) Worse for some providers 27%

(b) General commodity trucking industry

(1) Better for all users 35%
(2) Better for some users 55%
(3) Worse for all users 5%
(4) Worse for some users 6%
(5) Better for all providers 5%
(6) Better for some providers 56%
(7) Worse for all providers 10%
(8) Worse for some providers 29%

(c) Household goods moving industry

(1) Better for all users 36%
(2) Better for some users 62%
(3) Worse for all users 2%
(4) Worse for some users 0%
(5) Better for all providers 14%
(6) Better for some providers 57%
(7) Worse for all providers 6%
(8) Worse for some providers 23%

(d) Communications industry

(1) Better for all users 20%
(2) Better for some users 52%
(3) Worse for all users 19%
(4) Worse for some users 10%
(5) Better for all providers 12%
(6) Better for some providers 65%
(7) Worse for all providers 8%
(8) Worse for some providers 15%

(e) Finance industry

(1) Better for all users 26%
(2) Better for some users 3%
(3) Worse for all users 19%
(4) Worse for some users 52%
(5) Better for all providers 37%
(6) Better for some providers 12%
(7) Worse for all providers 2%
(8) Worse for some providers 49%

On behalf of Atlas Van Lines and the entire household goods moving industry, we wish to thank the corporate executives who took the time and effort necessary to complete this questionnaire. Their participation in helping us develop this unique and valuable guideline will contribute greatly to continued improvement in household goods moving services.

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